

DemandTools Help
for the **Address Verification Module**



The Address Verification tool is designed to permit you to ensure that the addresses of your Leads, Contacts and Account are not just mailable, but also contain as much information as possible. An invalid address can be very costly to an organization that does a significant amount of direct mail with thousands of dollars spent sending marketing material to non-mailable addresses.

The Address Verification tool provides 4 key areas of validation and enrichment that not only solve the issues of non-mailable addresses but also ensure that your address are a rich as possible and provides some geographical enrichment for use in ownership assignment or object mapping.

- Address Verification**
 - Ensure that you address is mailable based on the USPS or Canada Post online databases
- Address Repair**
 - Ensure that city names are spelled correctly
 - Make sure states are in the correct 2 digit state code
 - Correct address abbreviation (i.e. Street and ST. are converted to St)
 - Fix spelling on street names
- Address Enrichment**
 - Add or remove directional information (i.e. Main Street should be Main St W)
 - Fix Zip codes and make them 9 digit
- Object Enrichment**
 - Add in geographical location (latitude and longitude)
 - Add in County name
 - Add in Congressional district

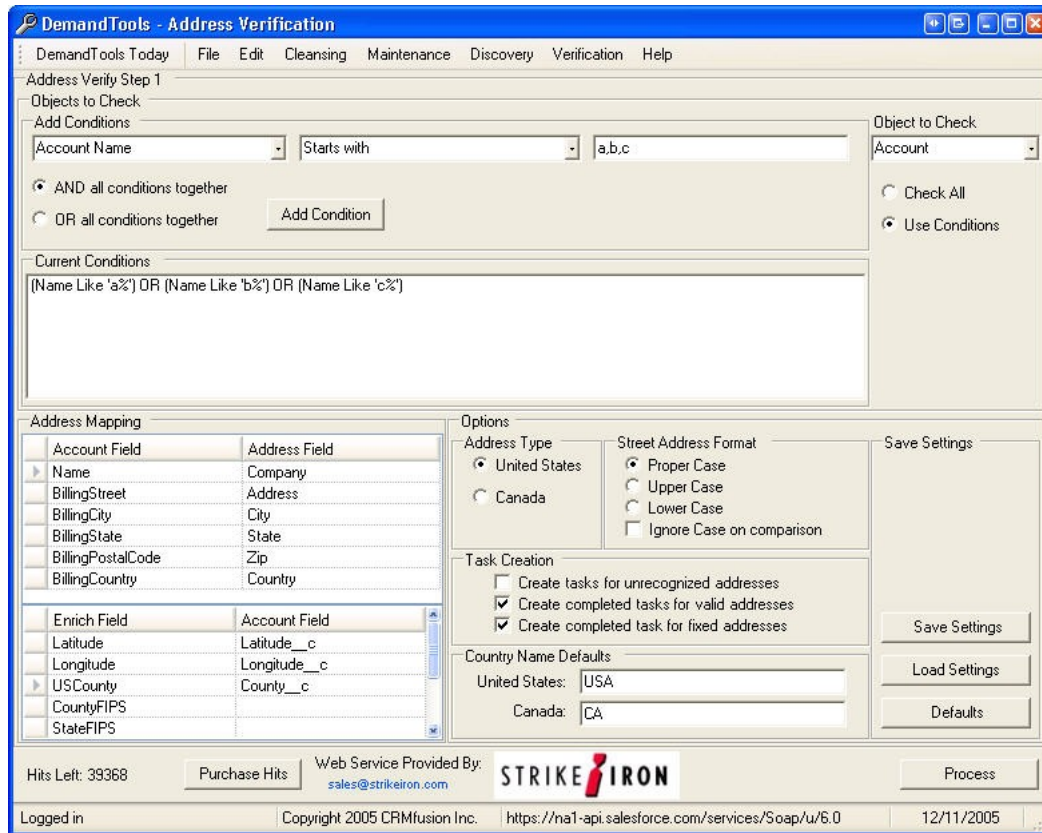
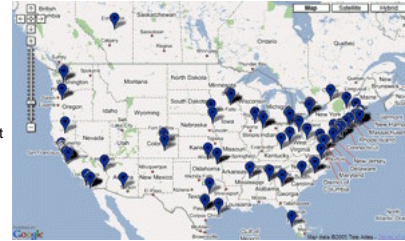
Benefits of Address Verification:

The valid addresses from the Address Verification tool are in **CASS** or SERP standards so you will benefit from the least expensive bulk mailing rates.

You will be able to mark the addresses that are invalid and even provide an open task for the object owner in order to fix the non-valid addresses.

With enrichment data like County and Congressional district you can use this information for account reassignment. Many organizations separate Account ownership in populous areas by county.

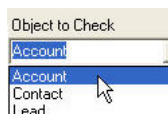
With the advent of Google Maps and other mapping tools you can view your Leads, Contacts and Accounts in relation to each other in order to find specific trends or find Leads close to existing Accounts. The image on the left shows salesforce data displayed in Google Maps.



The above image shows the first step of the Address Verification process

Step 1- Select Object to Verify

Your first step is to select what type of object you want to verify addresses for. Your choice is Account, Contact or Leads. You can only check one object at a time and one type of address (i.e. Billing or Shipping) at a time.



Step 2- What Object to Check

You must now determine if you are going to verify the addresses of all of your selected objects (i.e. Accounts in the example) or just a subset. We recommend that you do not attempt to validate more than 10,000 records at a time. The tool has been tested in validating 10x this number but it could reach the limits of your available memory or be too much information to review in a single session.

- Check All
 Use Conditions

The best way to limit the number of attempted verifications is by the first letter of the object name. If you are verifying Accounts and have 50,000 Accounts in your database you could search just the Accounts where the name "Starts With" "a,b,c,d,e". This way you will only look at a subset of your Accounts

If you select "Use Conditions" the "Add Conditions" section will become active and you can add in the condition.

Step 3- Address Mapping

This is the most vital part in the verification process as you will determine what fields you are checking and what fields you would like enriched.

The top section of the mapping for all fields is mandatory (except for Company). The default (for Accounts) is to verify the billing address. If you want to verify the shipping address simply select the Account fields and change them to the shipping address fields

The lower section is optional and allows you to map your standard and custom salesforce fields to available enrichment data. If you would like to geocode your address information or add in County names you would map your custom fields to the enrichment fields in this area. The **Verification Date** field will put the current date into a custom date field in salesforce. We recommend that you first create a custom date field in salesforce for verification date and then map this field to it so that future address verifications can be done only on those objects where the custom verification date field is not populated.

Account Field	Address Field
Name	Company
BillingStreet	Address
BillingCity	City
BillingState	State
BillingPostalCode	Zip
BillingCountry	Country

Enrich Field	Account Field
Latitude	Latitude_c
Longitude	Longitude_c
USCounty	County_c
CountyFIPS	
StateFIPS	

Step 4- Default Country Names

Enter the default name that you would like for the country that you are doing address verification for. The default value for the United States is US by many organizations prefer USA, U.S.A. or United States. When addresses are verified the tool will ensure that this is the standard country name

Country Name Defaults
United States: USA
Canada: CA

Step 5- Set Address Type and Format

Select the country that you are validating addresses for and also the case for the address you are verifying. In most cases CRM data is stored in "Proper Case" (i.e. 123 Main St). You also have the option to use Upper and Lower case. We recommend using Proper case as you can always export the data to XLS and convert to Upper or Lower case.

Address Type
 United States
 Canada

Street Address Format
 Proper Case
 Upper Case
 Lower Case
 Ignore Case on comparison

When the comparison of addresses is performed the tool will by default consider the case of your address. For example, if you address is 123 MAIN ST and the recommended address is 123 Main St the tool will recommend changing this address. If you select the "Ignore Case on comparison" checkbox these two values will be considered equal and no changes will be recommended

Step 6- Task Creation

You have the option to create 3 separate types of tasks based on how addresses are verified or enriched.

- Create open tasks for unrecognized (invalid) addresses. If an address is not in the USPS database an open task will be created for the owner of the object the address belongs to. **Warning....** This can create many open tasks
- Create completed tasks for valid addresses. If an address is mailable and does not need any of its components fixed a completed task will be created for the object the address belongs to.
- Create completed tasks for fixed (enriched) addresses. If an address is enriched (i.e. 9 digit zip added, city name repaired) a completed task will be created on the object the address belongs to.

Task Creation
 Create tasks for unrecognized addresses
 Create completed tasks for valid addresses
 Create completed task for fixed addresses

Step 7- Confirm Verification

When you select the "Process" button the tool will download the required objects based on your conditions of the objects to download. Once the information has been accessed and initially analyzed by the address verification module you will see a confirmation screen as shown on the right. At this point you have several options before you proceed with the full verification.

- The top section shows the total number of records that do not have enough information to even attempt a verification. At this point you can export these records to possibly correct them in the future
- The second section shows the total number of hits (verifications) you have remaining. You can purchase additional hits at this point by selecting the "Purchase additional hits" button. Remember that a **hit is only used if an address is verified**. Invalid addresses do not count as against your hits.
- The bottom section allows you to verify all of the records or just a specific number of records.

When you are ready to perform the verification select the "Verify Addresses" button.

Address Verification Confirmation
Downloaded Records
5 of the records did not include enough information for verification and will be marked as unverifiable in the results file.
Export unverifiable addresses

Verification Hits Remaining
You have 33368 verification hits remaining. After this verification you will have at least 33138 remaining.
Purchase additional hits

Verification Control
 Verify all records
 Verify up to: 0 addresses
Refresh available hits
Cancel
Verify Addresses

Total number of records downloaded: 235

Step 8- Accepting Address Enrichments

Once the initial verification is completed the required tasks will be added to salesforce for the fixed, confirmed and invalid addresses (if requested). After this process you will have the opportunity to accept the address enrichments recommended by the application. By checking the checkbox by the address components you will update that component to it's recommended value. A sample of the final screen is shown below

DemandTools - Address Verification

DemandTools Today | File | Edit | Cleansing | Maintenance | Discovery | Verification | Help

Address Verify Step 2

Item	Address	City	State	Zip	Country
	Recommended	Recommended	Recommended	Recommended	Recommended
Soft Systems	<input type="checkbox"/> 1089 Beaver Ridge Trl	<input type="checkbox"/> Broadview Hts	<input type="checkbox"/> OH	<input type="checkbox"/> 44147-1919	<input checked="" type="checkbox"/> USA <input type="checkbox"/> US
Soil Conservation	<input checked="" type="checkbox"/> 803 E Washington St Num 210 <input type="checkbox"/> 803 E Washington St Ste 210	<input type="checkbox"/> Medina	<input type="checkbox"/> OH	<input checked="" type="checkbox"/> 44256-3333 <input type="checkbox"/> 44256-3326	<input checked="" type="checkbox"/> USA <input type="checkbox"/> US
Soil Conservation Service	<input checked="" type="checkbox"/> 540 W Union St 40 <input type="checkbox"/> 540 W Union St	<input type="checkbox"/> Athens	<input type="checkbox"/> OH	<input type="checkbox"/> 45701-2331	<input checked="" type="checkbox"/> USA <input type="checkbox"/> US
Soita	<input checked="" type="checkbox"/> 150 E Sixth St <input type="checkbox"/> 150 E 6th St	<input type="checkbox"/> Franklin	<input type="checkbox"/> OH	<input type="checkbox"/> 45005-2559	<input checked="" type="checkbox"/> USA <input type="checkbox"/> US
Solar Testing Labs	<input type="checkbox"/> 5399 Lancaster Dr	<input checked="" type="checkbox"/> Brooklyn Hts <input type="checkbox"/> Brooklyn Heights	<input type="checkbox"/> OH	<input type="checkbox"/> 44131-1848	<input checked="" type="checkbox"/> USA <input type="checkbox"/> US
Solarflo	<input type="checkbox"/> PO Box 46391	<input type="checkbox"/> Bedford	<input type="checkbox"/> OH	<input type="checkbox"/> 44146-0391	<input checked="" type="checkbox"/> USA

Hits Left: 39322 Purchase Hits Web Service Provided By: sales@strikeiron.com **STRIKE IRON** Back Update Records

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Once you have agreed with the proposed changes you simply select the "Update Records" button and the information on the address values will be updated. After this is completed you will be presented with the status of the update, the location of the error log and the location of the enrichment file.

The enrichment file contains all the information on what addresses were valid or not plus all of the recommended enrichments for the addresses. If you missed updating the geographical position of the address or the county name you could use MassEffect and this file to update the address information after the fact.